



# Contribution Agreement

Please provide a contribution agreement each time you contribute to your donor-advised fund (DAF) account. You may complete the agreement either by using this form or by logging in to your DAF account at [nptgivingpoint.org](http://nptgivingpoint.org) and selecting *Contribute to Account*. If you are making an initial contribution to establish your DAF, the minimum is \$10,000. National Philanthropic Trust recommends completing this contribution agreement in advance of submitting assets.

National Philanthropic Trust (NPT) reserves the right to request a new donor-executed contribution agreement if the contribution is not received within 120 days of submission of the original form.

If you need assistance, call (888) 878-7900 or email [npt@nptrust.org](mailto:npt@nptrust.org).

## 1. Donor-Advised Fund Information

Donor-Advised Fund Name DAF Account Number

### Primary Advisor

Prefix First Name MI Last Name Suffix

## 2. Select a Donor

Identify all registered owner(s) of the assets being donated. NPT will provide a contribution receipt for federal tax reporting purposes to the person(s) identified. Contribution receipts will be made available on the donor portal. **If the contribution is being made by a Private Foundation or Company, skip below sections and complete information on the next page.**

### Primary Donor

Prefix First Name MI Last Name Suffix Year of Birth

Street Address City State ZIP

Email Phone

Does the Primary Donor hold a U.S. passport? Yes No

### Joint Donor

Prefix First Name MI Last Name Suffix Year of Birth

Street Address City State ZIP

Email Phone

Does the Joint Donor hold a U.S. passport? Yes No





### 3. Contribution Asset Information (continued)

**Check**

Check Amount \$

**Make payable to:** National Philanthropic Trust  
**Note:** On your check memo line, please include your DAF name and account number.

Check Number

**Mail check with Contribution Agreement form to:**  
 National Philanthropic Trust  
 165 Township Line Road, Suite 1200  
 Jenkintown, PA 19046  
**Tax ID#:** 23-7825575

**Grant or Transfer from Private Foundation or Donor-Advised Fund**

Estimated Dollar Amount \$

Transferring Institution

By Check  
 By Wire

Account # at Transferring Institution

Wire ID (if known)

**Stocks/Bonds/Mutual Funds/ETFs**

If contributing securities, bonds, or mutual funds, please complete the section below. Please note that the external custodian currently holding the assets may require that you submit a *Letter of Instruction* to initiate the transfer of the assets; if so, please present originals of the completed Letter of Instruction to the external custodian and not to NPT.

Are you a corporate officer, director or other executive of the stock issuer, or a member of the controlling group or otherwise an affiliate of the stock issuer for any of the securities below?    Yes    No

Are any securities that you are contributing pursuant to this agreement restricted or control securities and subject to: Rule 144, 144A, 145, 701 or Regulation S of the U.S. Securities Act of 1933, as amended, an effective registration statement, and/or any contractual limitations.    Yes    No

- If you answered “Yes” to the either of the above two questions, please check “Yes” in the “Restricted/Control” column in the table below relative to the specific securities, and please contact NPT at (888) 878-7900 or npt@nptrust.org for further guidance prior to initiating a transfer of the securities. A member of our Donor Relations Team will forward to you a **Restricted and Control Stock Questionnaire** that must be completed prior to NPT accepting your contribution.\*

**Note: Securities held for less than one year may not be eligible for a fair market value tax deduction.**

Name of Stocks/ Bonds/ Mutual Funds/ETFs	Ticker/ CUSIP	# of Shares	Restricted/ Control*	Account # and Name of Transferring Institution	Acquisition Date	Estimated Value
			Yes    No			
			Yes    No			
			Yes    No			
			Yes    No			
			Yes    No			
			Yes    No			
			Yes    No			
			Yes    No			
			Yes    No			

Please make copies of this page if there are more than 10 instruments being contributed.

**Will any portion of your gift originate from a bank account outside of the U.S?**    Yes    No



### 3. Contribution Asset Information (continued)

**All Depository Trust Company — eligible & free transactions should be directed to:**

**Brokerage Firm:** UBS Financial Services

**For Benefit of:** National Philanthropic Trust

**DTC Number:** 0221

**A/C Title:** National Philanthropic Trust

**A/C Number:** UT51093

#### **Physical Certificates and Other Non-Cash Asset Types**

Further documentation will be required. For assistance, please call National Philanthropic Trust at (888) 878-7900.

### 4. Acknowledgement of Terms (All donors or trustees named in Section 2 must sign below)

I understand that my gift of the property described in Section 3 is an irrevocable and unconditional contribution when received and accepted by NPT, and that NPT retains exclusive legal control over contributed assets.

By signing below I represent that I will, and undertake to, comply with and fulfill all of my obligations under applicable laws, regulations and any corporate insider trading policies or procedures to which I may be subject, and will not breach such applicable laws, regulations or policies and procedures with respect to any contribution to a donor-advised fund (DAF). I represent that as of the date of this agreement I am not in possession of any material non-public information with respect to any such contributed securities. Further, I represent that I will not transfer or direct a transfer of securities to National Philanthropic Trust (NPT), nor will I make any investment recommendation, at a time when I am in possession of any material non-public information with respect to such securities or recommendation. I also agree to provide NPT promptly with all information necessary for NPT to perform its obligations under applicable laws and regulations.

By signing below, I understand and agree that NPT, in its sole discretion, may decline to accept certain restricted or control securities and/or may decline to accept a contribution until NPT has conducted due diligence on the contribution transaction. I further agree to provide, without cost to NPT, all documentation required by NPT to complete due diligence on my contribution. Furthermore, I acknowledge and agree that there may be a time delay in NPT's processing and acceptance of my contribution as a result of the due diligence process.

I acknowledge that I have read the NPT's **A Guide to Your Donor-Advised Fund** and agree to the terms and/or conditions contained therein. I certify that, to the best of my knowledge, all information in connection with this contribution agreement is accurate and I will notify NPT in writing of any changes. Additionally, I understand, in accordance with NPT's Know Your Client/Anti-Money Laundering Procedures, that NPT may obtain, record and verify information that identifies each person who makes a contribution to a donor-advised fund at NPT.

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Donor/Trustee/Authorized Advisor Signature

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Print name

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Date (DD/MM/YYYY)

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Joint Donor/Trustee/Authorized Advisor Signature

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Print name

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Date (DD/MM/YYYY)

**RETURN THIS COMPLETED FORM BY MAIL, FAX OR EMAIL TO: National Philanthropic Trust**  
165 Township Line Road, Suite 1200, Jenkintown, PA 19046 | Fax: (215) 277-3029 | [npt@nptrust.org](mailto:npt@nptrust.org)

